
SOUTH DAKOTA PUBLIC LIBRARY STANDARDS

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Governance & Administration: Kathy Jacobs, Yankton Community Library, Chair; Jane Larson, Vermillion Public Library; Carole Stricherz, Cozard Memorial Library and Bev Lewis, Rawlins Public Library

Access & Collections and Resources: Mike Mullin, Watertown Regional Library, Chair; Teresa Peterson, Hamlin/Codington Regional Bookmobile Library, Jan Schiernbeck, Castlewood Public Library; Robin Schrupp, Grant County Library

Funding & Staffing: Jane Norling, Beresford Public Library, Chair; Elvita Landau, Brookings Public Library; Mary Ferwerda, Centerville Community Library/School Library; Sally Felix, Siouxland Libraries

Technology & Public Relations: Amber Wilde, Grace Balloch Memorial Library, Chair; Jason Walker, Rapid City Public Library; Juliet Heltibridle, Phoebe Apperson Hearst Library; Vicki Anderson, Northwest Regional Library

South Dakota State Library: Colleen Kirby, chair; Jane Healy, Brenda Hemmelman, Stacia McGourty, Daria Bossman, ex officio

Review Committee: Kathleen Slocum, chair; Brenda Hemmelman; Shawn Behrends

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INTRODUCTION

South Dakota Public Library Standards is a self-evaluation tool. The purpose of the voluntary certification and accreditation program for public libraries and librarians in South Dakota is to encourage the ongoing development of quality library service in the state. For a list of basic services, a library should strive for, see Appendix D. The SD Public Library Standards are intended to:

- Provide a tool to assess the quality of library service
- Identify areas needing improvement
- Aid libraries in gaining maximum community support

The manual is divided into three sections by level of accreditation. Each section is then divided into the following categories:

- Governance
- Administration
- Access
- Collections and Resources
- Funding
- Staffing
- Technology
- Public Relations

Each standard is presented as a statement, allowing the library to easily determine whether it meets or does not meet the criteria. There are three levels of accreditation:

ESSENTIAL – the minimum which should be available to all;

ENHANCED – an expansion of services beyond the basic;

EXEMPLARY – the highest level of service

To be accredited at the Essential level a library must meet all of the Essential Standards.

To be accredited at the Enhanced level a library must meet all of the Essential standards and all but two of the Enhanced standards. The two Enhanced standards that a library selects as exemptions cannot be in the same category. Trustee training (#38) is required.

To be accredited at the Exemplary level a library must meet all of the Essential standards, all of the Enhanced standards, and all but two of the Exemplary standards. The two Exemplary standards that a library selects as exemptions cannot be in the same category. Trustee training (#63) is required.

SDSL's Library Development staff is prepared to assist public libraries in using this manual to its full potential and will be able to answer any questions you may have regarding the new standards.

Appendices, checklists, and useful references are also included.

GUIDELINES FOR VOLUNTARY PUBLIC LIBRARY ACCREDITATION

This document is for your use as you work on the Voluntary Standards for Accreditation. You may print out this document for your own records.

Note that we are no longer accepting Accreditation applications through email or in paper format through the postal service. Only online applications will be accepted.

The application will be accessed through your library account on <https://sd.countingopinions.com/> in September of each year.

Applications are accepted September through December of any given year. Specific dates will be announced via the public library listserv.

The South Dakota State Library Accreditation Committee will review all applications. Libraries will receive their Accreditation certificates at SDLA Legislative Day in Pierre.

LIBRARY HOURS GUIDELINES FOR APPLICANTS

HOURS OPEN TO THE PUBLIC

| POPULATION SERVED | MINIMUM | DESIRABLE |
|-------------------|---------|-----------|
| 0-3,499 | 15 | 25-40 |
| 3,500-9,999 | 30 | 40-50 |
| 10,000-24,999 | 40 | 50-60 |
| Over 25,000 | 50 | 60+ |

Evening Hours definition: where “evening hours” are referenced, the library must be open at least one day per week until 7 pm or later.

(Many libraries exceed the minimum hours because the community, Board of Trustees and the library director recognize that the number of hours of public service is directly related to greater use by the public.)

ESSENTIAL LEVEL

To be accredited at the Essential level, a library must meet ALL of the following:

Governance

- __ 1. The library provides free access to tax-supported public library services to the residents of the political subdivisions which supply the library's tax support. These services shall include, but are not limited to:
 - a. Free loan of print and non-print materials from the local circulation collection;
 - b. General reference and information services;
 - c. Access to other library collections via interlibrary loan; and
 - d. Access to computer with Internet access and a printer.
- __ 2. The library is legally established and operates in accordance with Chapter 14 of the South Dakota Codified Laws. Send a copy of your city or county ordinance with the issue date. (If you have done this in the past please make a note of when your library included this information. This will be for renewals.)
- __ 3. A legally appointed or selected Board of Trustees governs the operation of the library. Required by law 14-2-35
- __ 4. The library's Board of Trustees assists the library director in preparing and adopting an annual budget, and may accept gifts and donations for library purposes. Required by law 14-2-40 #3 and #4, and 14-2-41 #1
- __ 5. The library's Board of Trustees hires/appoints the library director and delegates active management of the library to the library director. Required by law 14-2-40 #1
- __ 6. The library's Board of Trustees has written bylaws which outline its purpose and its operational procedures. Required by law 14-2-40 #2
- __ 7. The library's Board of Trustees meets regularly and not less than once each quarter with the library director in attendance. These meetings are held at a time and in a physically accessible location convenient for the board members and the community and in compliance with state law on open meetings, the Sunshine Laws, and the Americans with Disabilities Act. Required by law 14-2-40 #5
- __ 8. The library submits the Annual Report of South Dakota Libraries to the South Dakota State Library. Required by law 14-2-40 #6
- __ 9. Library board members collectively attend a minimum of 15 hours of continuing education concerning library board issues every three years. REQUIRES DOCUMENTATION
 - a. No one board member can obtain all 15 hours.
 - b. All of the 15 hours can be obtained online. (Please make sure that you submit the CE Certificates from whatever you participated in.)
 - c. Online course-work must be pre-approved by the SDSL CE Coordinator and the site must be archived and reviewable by the SDSL accreditation's committee at the time of application.
 - d. Libraries are responsible for keeping an accurate record of their own collective board CE hours, events and dates.

Administration

- __ 10. The library director prepares current library financial and statistical reports for review at each meeting of the library's Board of Trustees. Required by law 14-2-42 #2
- __ 11. The library director is responsible for administration of personnel, consistent with local personnel policies.
- __ 12. The library director is responsible for developing library operating procedures.

Funding

- __ 13. The library is primarily supported on a permanent basis by funds from the city, county and/or other political subdivision(s). Grants, donations and other revenue sources supplement, but do not supplant, local tax support. Required by law 14-2-27 #4
- __ 14. The library's Board of Trustees with the library director develops an annual budget based on the library's plan and presents the budget to their funding authorities. Required by law 14-2-40 #3

Staffing

- __ 15. The library has a permanent, paid director who is, or will be within two years of hire, certified at the required level, or who is actively enrolled in a program leading to the required certification. (See Appendix A)
- __ 16. Paid library staff is present during all hours when the library is open. Unpaid volunteers may be used as substitutes during occasional absences of paid staff for vacation, sick leave and attendance at continuing education events.
- __ 17. The library follows generally accepted employment practices and procedures that insure equitable treatment of all employees and complies with local, state, and federal employment laws.
- __ 18. The librarian shall appoint such staff as are necessary to operate the public library within its budgetary limitations. Library employees shall receive any employee benefits provided all other employees of the local governmental unit and shall be compensated at rates determined by the governing body's compensation schedule. If no such schedule exists, the salary shall be set by the library board. Required by law 14-2-42 #3

Access

- __ 19. All in-house library services are available to all individuals when the library is open.
- __ 20. **Library hours are fixed and prominently posted. Library is open at least 15 hours per week including evening OR weekend hours. Public service hours are set based on users' and potential users' disposable time. (See PAGE 4)**
- __ 21. The library has its own telephone within the library with the number publicly available. (e.g. website, signage, newspaper, telephone directory, etc.)
- __ 22. The library building, if constructed, occupied or remodeled since January 26, 1992, meets the accessibility requirements of the Americans with Disabilities Act of 1990. If the building was constructed, occupied and last remodeled prior to January 26, 1992, access to library programs and services for persons with disabilities is provided by meeting the accessibility requirements of the Americans with Disabilities Act of 1990 or through

alternate methods such as bookmobiles, home delivery, staff aides or other methods which make the programs and services of the library readily accessible.

- ☐ 23. Adequate and convenient parking is available to the library's patrons and staff.
- ☐ 24. The exterior of the building is well lighted and identified with signs clearly visible from the street.
- ☐ 25. The library's facility is safe for the public and staff.

Collections and resources

- ☐ 26. The library's Board of Trustees with the library director develops an annual materials budget within the library's budget. The funds allocated are designated for purchasing materials in a variety of formats and for accessing electronic resources based on the library's collection development policy.
- ☐ 27. The library uses interlibrary loan to supplement, but not supplant, local collection development.
- ☐ 28. Materials are purchased at regular intervals throughout the year to ensure a steady flow of new materials for the public.
- ☐ 29. In the course of a five year cycle the library's collection is evaluated for retention, replacement, or withdrawal.

Technology

- ☐ 30. Library provides Internet access and personal computing applications to patrons free of charge. Access to a printer is also available.
- ☐ 31. Library provides access to online resources, including those offered by the South Dakota State Library.
- ☐ 32. Library computers are maintained and updated.

Public Relations

- ☐ 33. Library recognizes all contributions to the library with personal letters, plaques, or other appropriate means.
- ☐ 34. Library staff, volunteers, and board members are knowledgeable about library services and versed in promoting the library within the community.

ENHANCED LEVEL

To be accredited at the Enhanced level, a library must meet ALL of the Essential standards and all but two of the Enhanced standards. The two Enhanced standards that a library selects as exemptions cannot be in the same category. Trustee training (#38) is required.

Governance

- __ 35. The bylaws of the library's Board of Trustees are reviewed at least every three years. REQUIRES DOCUMENTATION (IE COPY OF MINUTES OF BOARD MEETING WHERE THEY WERE REVIEWED)
- __ 36. The library's Board of Trustees with the library director develops, studies, evaluates and adopts written policy for operating the library. Minimally the policies need to include:
 - a. Circulation
 - b. Collection development
 - c. Confidentiality of library records
 - d. Handling of gifts
 - e. Personnel.
 - f. Computer/Internet use -add link to examples
 - g. Electronic resources (databases)

All policies are reviewed at least every three years. All policies are available for public inspection. REQUIRES DOCUMENTATION (IE COPY OF MINUTES OF BOARD MEETING WHERE THEY WERE REVIEWED; LINK TO POLICIES ON LIBRARY WEBSITE)

- __ 37. Members of the Board of Trustees are encouraged to take advantage of additional training opportunities and are kept informed of upcoming library-related continuing education.
- __ 38. Library board members collectively attend a minimum of 30 hours of continuing education concerning library board issues every three years. REQUIRES DOCUMENTATION
 - a. No one board member can obtain all 30 hours
 - b. A maximum of 20 required hours can be obtained online
 - c. Online coursework must be pre-approved by the SDSL CE Coordinator and the site must be archived and reviewable by the SDSL accreditation's committee at the time of application.
 - d. Libraries are responsible for keeping an accurate record of their own collective board CE hours, events and dates.

Administration:

- __ 39. Registration records shall be updated at least every three years.
- __ 40. The library director is responsible for ensuring communication between the library and its various constituency groups including the Board of Trustees, funding officials, patrons and staff.
- __ 41. The library director keeps the library's Board of Trustees informed of library services and programs.

- __ 42. The library evaluates one program annually in terms of outcomes achieved. Three evaluations total for three-year renewal cycle. REQUIRES DOCUMENTATION (for an example, see Appendix B)
- __ 43. The Library Director is responsible for public relations between the library and community. This may be done through personal appearances, memberships in community organizations, press releases, newspaper columns or newsletters, websites, etc.

Funding

- __ 44. The library seeks equitable reimbursement for service to persons who do not reside in the political subdivisions providing financial support for the library. These fees are at least equal to the per capita rate of income from the political subdivision(s) which provide the library's principal tax support. INCLUDE CITY OR COUNTY BOARD MINUTES WHERE TOPIC WAS DISCUSSED

Staffing:

- __ 45. There are library staff members who are computer literate, able to use electronic mail, and trained to use and assist the public in using available electronic materials and sources. INCLUDE WEBSITE URL
- __ 46. The library director is active in community and library organizations.

Access

- __ 47. The library has an automated catalog of its holdings in an area easily accessible to staff and patrons. The library catalogs and organizes its collection according to standard cataloging and classification systems and procedures. Automated records comply with the machine-readable catalog (MARC) format.
- __ 48. The library has printed directional signs and instructions for the use of collections, the card catalog/online catalog, and other library services.
- __ 49. A book return is provided for returning library materials when the library is closed.
- __ 50. The library authorizes and maintains an up-to-date Web presence that includes library hours, phone numbers, services, and other basic information. INCLUDE WEBSITE URL

Collections and resources

- __ 51. Library makes available the local county and/or regional newspaper.
- __ 52. The library uses at least one professionally recognized review source as a selection tool. INCLUDE TITLE OF SOURCE
- __ 53. The library's Board of Trustees adopts a collection development policy which includes the selection criteria for electronic resources. INCLUDE A COPY OF THE CD POLICY OR WEBSITE LINK

Technology

- __ 54. Library has a technology plan in place that is adopted by the Library Board and evaluated every three years. (See Appendix C) The technology plan includes a timeline and proposed annual budget for library technology improvements. INCLUDE A COPY OF TECHNOLOGY PLAN OR BOARD MEETING MINUTES AT WHICH PLAN WAS REVIEWED
- __ 55. Library offers services via telephone, e-mail, chat, and/or other device as appropriate to the community served.
- __ 56. Library participates in online statewide interlibrary loan service.

Public Relations

- __ 57. Library maintains a list of contacts for local schools, community organizations, and elected officials and communicates regularly with these entities.
- __ 58. Library promotes and publicizes the library using its web presence as well as such items as a newsletter, direct mailings, bookmarks, posters, flyers, displays, exhibits, bulletin boards, informational brochures and/or printed specialty items.
- __ 59. Library participates in local events. (e.g. Parades; Winter Festivals; Art in the Park; Fairs).
- __ 60. Library maintains a list of local media contacts and regularly sends them information about library events, programs, and services.

EXEMPLARY LEVEL

To be accredited at the Exemplary level, a library must meet ALL of the Essential standards, ALL of the Enhanced standards, and all but two of the Exemplary standards. The two Exemplary standards that a library selects as exemptions cannot be in the same category. Trustee training (#63) is required.

Governance

- __61. The library's Board of Trustees ensures that an annual performance evaluation of the library director is conducted, either by the Board itself or the library governing body. REQUIRES DOCUMENTATION (IE COPY OF MINUTES OF BOARD MEETING WHERE EVALUATION WAS DISCUSSED).
- __62. At least one member of the Library Board must attend one library education event annually. The library education can be either an in-person or online event. The library provides support for this continuing education which includes, but is not limited to, payment for workshop registration and travel expenses.
- __63. Library board members collectively attend a minimum of 45 hours of continuing education concerning library board issues every three years. REQUIRES DOCUMENTATION
 - a. No one board member can obtain all 45 hours
 - b. A maximum of 30 of the required hours can be obtained online
 - c. Online coursework must be pre-approved by the SDSL CE Coordinator and the site must be archived and reviewable by the SDSL accreditation's committee at the time of application.
 - d. Libraries are responsible for keeping an accurate record of their own collective board CE hours, events and dates.

Administration

- __64. The library has a written long-range plan developed by the library's Board of Trustees and the library director. The plan contains a mission statement, goals and specific annual action to achieve the goals. The plan is reviewed and/or updated annually by the library's Board of Trustees. INCLUDE COPY OF THE PLAN OR WEBSITE LINK
- __65. The library director keeps the library's Board of Trustees informed of national issues facing libraries.
- __66. The library evaluates one teen, one adult and one children's program annually in terms of outcomes achieved. A copy of these evaluations is submitted with this application for accreditation. Nine evaluations total for three-year renewal cycle. REQUIRES DOCUMENTATION (for an example, see Appendix B)

Funding

- __67. The Library seeks funding for special programs and services from non-government sources. (e.g. grants, gifts, foundations, Friends of the Library)

Staffing

- ☐ 68. Employee performance is evaluated annually.
- ☐ 69. Written job descriptions for each position including a list of duties and experience requirements are available for review.
- ☐ 70. The library has a staff member that is assigned to specific service areas such as: children's services, adult services, reference, or technical services. LIST NAMES AND JOB TITLES

Access

- ☐ 71. The library has public meeting space available for its programming and for use by other community groups.

Technology

- ☐ 72. Library subscribes to online resources appropriate to its community and promotes the use of online resources on their website and within the library.
- ☐ 73. Library offers training and/or classes to patrons in dealing with computer software and online resources, as well as other technology-related skills and issues. LIST TITLES AND DATES OF CLASSES
- ☐ 74. Library website offers added features such as social networking, downloadable audio, or other types of interactive content.
- ☐ 75. Library offers free wireless internet.

Public Relations

- ☐ 76. Library has and promotes a Friends of the Library group or other organized volunteer group.
- ☐ 77. Library has and regularly updates a marketing/public relations plan. (See Appendix E) INCLUDE A COPY OF THE PLAN OR WEBSITE LINK
- ☐ 78. Library has a logo and/or slogan that is used on signage and promotional materials.
- ☐ 79. Library conducts regular surveys to determine satisfaction of community as well as effectiveness of marketing strategies. REQUIRES DOCUMENTATION (e.g. copy of survey; minutes of board meeting discussion, etc.)
- ☐ 80. Library participates in state and nationally organized programs and events. (e.g. National Library Week; Teen Read Week; Banned Books Week; Children's Book Week; Teen Tech Week; Prairie Pasque/Prairie Bud).

APPENDIX A

CERTIFICATION LEVELS FOR LIBRARY DIRECTORS

- Grade I: Master's Degree in librarianship from a graduate library program accredited by the American Library Association.
- Grade II: Bachelor's Degree from an accredited institution plus a minor in library science or library media (at least 18 college credit hours in library coursework).
- or-
- Bachelor's Degree from an accredited institution and completion of the South Dakota Library Training Institute.
- Grade III: High school diploma (or GED) with three years of verified library experience, and completion of the South Dakota Library Training Institute.
- or-
- A High School diploma and an associate degree in library studies from an accredited institution or at least 18 college credit hours of library coursework.

A provisional certification may be granted upon completion of the first year of the Library Institute and upon the completion of the Library Training Institute within seven years of beginning the program.

Required Certification Grade Levels for Library Directors

| Population Served | Certification Grade Levels |
|--------------------------|-----------------------------------|
| 10,000+ | I |
| 3,500-9,999 | II or higher |
| 1-3,499 | III or higher |

APPENDIX B

Evaluation of "Take Your Child to the Library Day" (Children's Program on 2/7/15)

GOAL: provide a positive early learning situation including basic fine and gross motor skill activities and language arts skills for ages 3-6 with a focus on interaction between parents, children and staff to encourage familiarity among all participants.

Time: 10-11:30

Time changed seemed to work better than the afternoon time period of last year. Increased attendance.
Just enough time to complete program for the day.

Attendance: unlimited, no registration

Total group attending included 15 children, 7 parents/grandparents, 1 assistant, 1 leader
Would encourage registration in advance if necessary, for supplies

Date: First Saturday in February

This is a national event and always takes place on this date. There were some local conflicting events.

Age group: 3-5 years old

Had originally tried a larger age span but the activities were better suited to this age group this year. It was a good switch.

Activities: stories, games, fingerplays, crafts

GAMES: Snowball fight: Large paper crumbled and thrown across to other team
Snow dance: large motor movement, identify body parts
Hunting Snowmen: search entire library for hidden snowmen
All of these games were appropriate for the children involved.

FINGERPLAYS: Build a Snowman
The children loved this one and we did it several times by request!

CRAFTS: Snowman Art (white chalk, cutout pieces of snowman, blue construction paper, glue)
small motor movements, weather awareness, following directions
Crazy Scissors Collage (construction paper, crazy scissors, lg butcher paper)
small motor movement, spatial relationships

The snowman art was easy enough for all to do. We ended up handing out markers so that the children could create differences in their project by adding on their own ideas, such as clothing for the snowman or environmental additions to the picture. The children enjoyed creating the collage with the scissors art. This was a recommendation from last year.

STORIES:
All You Need for a Snowman by Schertle
Just a Snowman by Mayer
One Snowy Day by Sherer

SNACKS: marshmallows and graham crackers
The mini marshmallows were the snow and the graham crackers were our building platforms.

FREE TIME: Winter pictures to color
This was successful in keeping the children occupied as the others were still arriving.
TAKE HOME: Pictures to color, crafts

WERE EXPECTED GOALS MET?

Yes! Parents visited the library that had not been here before. Two signed up for library cards for their family members.

APPENDIX C

MODEL TECHNOLOGY PLAN TEMPLATE

Provide name and location of library, and inclusive dates the Plan covers. **Make sure the plan is approved by the library board.**

- ☐ **MISSION STATEMENT** – Provide the mission statement for the library. In most cases, the mission statement can be taken verbatim from the library's current long-range or strategic plan. Link your library's mission statement to your Technology Plan.
- ☐ **PLAN JUSTIFICATION** – In one or two brief paragraphs discuss the library's technology goals in conjunction to the overall mission of the library and discuss the role technology plays in the library's services.
- ☐ **TECHNOLOGY STRATEGIC PLAN** – Discuss how technology will be integrated into the services provided to staff and for users. A strong plan will include goals, objectives, and strategies/activities. Goals are the broad statements regarding technology in the library and may extend beyond the lifetime of the Plan. Objectives are specific measurable activities to be undertaken to reach the goals. Strategies are the steps to be taken to meet the objective.
- ☐ **TECHNOLOGY INVENTORY** – This section should be broken down into two sections: current technology and future technology. In the first section list current computing and telecommunication technology being used at the library. If relevant, include a breakdown by branch. The future technology piece encompasses hardware, software, telecommunications, and information technologies the library hopes to implement during the lifetime of the Plan. If necessary, the future technology section should include a discussion of upgraded electrical systems required to handle new technologies.
- ☐ **BUDGET** – Includes approximate costs associated with the desired level of technology, both ongoing as well as upgrade and maintenance costs for current technology, as well as costs for intended new technologies. Also indicate from where funding will be derived. This is probably the section of the Plan most likely to require revision. Make sure mention is made of any maintenance contracts.
- ☐ **EVALUATION** – Provide an overall evaluation statement as to how the library plans to determine if the Technology Plan goals are being implemented and their degree of success. Additionally, indicate how you will know if technology is having a positive impact on staff, users, and the community, and how well technology is helping you address your overall library goals. Also indicate how often the Plan will be reviewed and updated and by whom.
- ☐ **TRAINING** – Provide detail on training for staff and patrons on current technology. Include information on what types of training are offered, by whom, and how often. Types of training provided could include, but is not limited to, programs on searching databases, word processing, searching the library catalog and so on.

TECHNOLOGY PLAN EXAMPLE:

Mission

The XYZ Library will provide all residents of the community with opportunities for education and growth by providing a variety of services, including but not limited to access to print and electronic materials.

Vision

The XYZ's mission to provide opportunities for education and growth requires that we stay abreast of innovations in technology as they affect format and delivery of information. Library patrons have come to expect access to technology within the library as well as beyond its walls and hours of operation, and increasingly we have the ability to offer this capability. Library staff should be prepared to not only offer but assist with patron technology and information needs. At the same time new systems and services should be intuitive so that all users, regardless of their skill level, can feel comfortable using them.

Resources to fulfill patron needs include:

- Local information resources: from library collections, newspapers, historical societies, municipalities, archives, and other unique collections.
- Databases and on-line services available only through user authentication.
- Free computer and/or internet access.
- Printing & document scanning.

Technological connections may also mean providing circulating computer materials such as devices. Collection development in these areas will be cognizant of trends in hardware, software, and demand for service.

Current Status

XYZ is a member of the Regional Library Consortium as well as the statewide ILL system. Through these resources, patrons can gain access to materials from all over the state and beyond with the help of the State Library. We also provide access to a number of databases, both locally and through the State Library.

The library currently has

For public use

- two terminals providing access to the online catalog and databases;
- ten PCs providing Internet access, connected to a networked printer;
- three PCs with dedicated children's educational games;
- one laptop and video projector for library programs and on-site use;
- one PC for microfilm scanning, printing, and saving;

For staff use

- Scanner, copier, printer (color/B&W);
- Eight staff PCs with the ability to share files and connection to the network copier/printer/scanner;
- Connection to the Internet;
- 7 staff telephones, 4 with individual voicemail; 1 central mailbox; and 1 cordless phone.

Subscription services

- Membership in a state consortium allowing patrons to download e-books and digital audio books;
- access to practice tests, genealogy research, historical maps, homework help, language learning, automotive repair guides, read-aloud children's books through TumbleBooks, and other special online services;
- Access to streaming and downloadable music through local subscription
- State specific driver's license practice exams.

Goals

1. Provide access to current technology within the library.
2. Offer technology-related training and assistance to the community.
3. Stay abreast of current trends and adapt library services to meet the needs of the community.

Objectives

Goal 1: Provide access to current technology within the library.

Objective 1.A Maintain current public computer center, replacing existing computers every 4-5 years, with a rotation of 2 every year. Older computers replaced will be swapped out to update other computers receiving less use (i.e. catalog, children's area, etc.)

- Cost: \$1,500 every year (hardware), \$500 every year (support)
- Staff time: NA
- Target date: Annually
- Evaluate: Consider down time of computers in evaluating replacement needs.

Objective 1.B Consider additional technology needs to include scanners, printers, microfilm equipment, cords, card readers, etc. and make readily accessible to the public.

- Cost: TBD
- Staff time: NA
- Target Date: Evaluate annually during budget cycle
- Evaluate: Monitor demand and keep list for consideration.

Objective 1.C Maintain currency of staff equipment, replacing on a 4 year cycle.

- Cost: \$1,000 every year (hardware), \$500 every year (support)
- Staff time: NA
- Target Date: Annually
- Evaluate: Consider down time of computers as well as level of use and needs of staff in evaluating replacement needs.

Objective 1.D Evaluate potential of network improvement and consider either rewiring project or secure wireless depending on technology improvements.

- Cost: TBD

- Staff time: NA
- Target Date: 20xx
- Evaluate: Will consider options at the time and consult with network support contractor to determine best option as well as budget.

Goal 2: Offer technology-related training and assistance to the community.

Objective 2.A Add laptops or tablets to facilitate computer classes and other library programs as well as to assist with increased proctoring and computer usage demands.

- Cost: \$4,000 (hardware), \$500 (support)
- Staff time: NA
- Target date: 20xx
- Evaluate: Use surveys and patron feedback as well as program assessments to determine success and adjust as needed.

Objective 2.B Provide one-on-one assistance as needed.

- Cost: NA
- Staff time: 20 hours/week
- Target date: ongoing
- Evaluate: Monitor usage of this service to determine needs for staff training or demand for classes.

Objective 2.C Develop classes on topics of interest. Possibilities include e-reader devices, basic e-mail usage, online safety/security.

- Cost: NA
- Staff time: 10 hrs./class for set up & 4 hours/month ongoing
- Target date: as needed
- Evaluate: Track inquiries and individual help sessions to determine needs. Track attendance to determine effectiveness.

Objective 2.D Maintain an updated collection of resources either physical or digital providing information on current trends in technology as well as manuals for common programs and equipment.

- Cost: \$300 annually
- Staff time: 12 hours/yr.
- Target date: Annually in January
- Evaluate: Weed existing collection based on age and use and determine additional needs based on recent developments in software, hardware, etc., and availability of resources.

Goal 3: Stay abreast of current trends and adapt library services to meet the needs of the community.

Objective 3.A Keep staff up to date with current technology through training

- Cost: TBD

- Staff time: 4 hrs./month per full-time staff member
- Target date: ongoing
- Evaluate: Document training, and encourage 1 hour per week for all full-time staff, ½ hour per week for part-time staff (on average).

Objective 3.B Monitor lists, blogs, and various library and technology publications.

- Cost: \$0
- Staff time: 4 hrs./week
- Target Date: ongoing
- Evaluate: Track trends and keep idea/wish list.

APPENDIX D

LIBRARY BASICS CHECKLIST

The following list is intended to help answer the following questions:

- Is this library welcoming?
 - What is our message?
 - What is our style?
1. **Accessibility**—Can people with disabilities easily use the library building and website.
 2. **Brand/Identity**—Does the library have a clear and consistent image? Includes consistent use of logo, full location info including web address.
 3. **Customer service**—Is the library's commitment to excellent customer service reflected in the courtesy and helpfulness shown to customers? Are there ID tags for staff? Can staff members articulate the library message? Are they encouraged to share their favorite books and other materials with users? Does front-line staff provide feedback on customer wants, complaints, compliments?
 4. **Décor, decoration**—Is the library too light or too dim? Is the library clean, clutter free? Is there effective use of posters, banners, art, and other promotional tools such as screen savers?
 5. **Display**—Are books and other materials displayed face out? Are there "shelf talkers?"
 6. **Local ownership**—How well does the library reflect the community, including its diversity? Is there a bulletin board? Displays of local art. Are there opportunities for the users to give feedback on library service/ interact with other users? Share their comments on books?
 7. **Message**—Does your library have a key message that expresses its mission? Does everyone on the staff know it? Are library policies clearly and widely communicated?
 8. **Media**—Does your library have a presence in relevant media? Is someone assigned to work with the press? Does your library initiate stories, interviews and placements of public service announcements/advertising?
 9. **Outreach**—Does the library have a life outside the building? Does it have a presence in the life of the community?
 10. **Programming**—Does the library actively offer and promote programs and/or training sessions? How are programs promoted?
 11. **Print materials**—Are there too many? Too few? What is the message? How is it communicated . . . on bookmarks and flyers . . . letterhead and business cards . . . newsletters?
 12. **Signage: Internal and External**—Is the library easy to find? Is it easy to find what you're looking for? Is the library mission visible? Does signage reflect awareness of diversity?
 13. **Telephone**— Does a person or a machine answer the phone? If it's a machine, does your telephone greeting help or harm your image? Is it clear? Easy to follow?

14. **Website**—Is the image/message consistent with other library communications? Is the website easy for patrons to navigate and find information? Is the contact information easily found? Would a visually impaired or older person have difficulty with the color scheme or text fonts? Does the website meet accessibility standards? Is the website a “branch library?”
15. **Body Language**—What is the unspoken message being delivered by staff?
16. **Public Service Hours** – Do your library hours align with your community needs?

APPENDIX E

BUILDING A MARKETING/ COMMUNICATION PLAN

Use the following basic outline as a roadmap:

1. **Introduction** (Brief statement outlining the context of the communication activity, including statement of the problem, relevant research, etc.)
2. **Communication goals** (The Dream. Big picture.)
3. **Objectives** (Doable, measurable outcomes)
4. **Positioning statement** (What should the library's image be? What do you offer that the competition doesn't?) Example: "The library is the best first stop for expert help in connecting children and youth to learning and discovery."--North Carolina State Library
5. **Key audiences** (External and Internal)
6. **Key message(s)** (What is your key message and three talking points?)
7. **Communication strategies** (How will you deliver the message? e.g. media, publications, displays, presentations, word of mouth. Consider budget, timetable, staff assignments)
8. **Evaluation measures** (How will you know what worked and what didn't?)

SAMPLE MARKETING COMMUNICATION PLAN

The Somewhere Public Library June 2004-2006

Introduction

The Somewhere Public Library has come a long way in a short time. Since moving to its current site two [2] years ago, library visitors have increased almost 300 percent and the number of cardholders has grown by 700 percent from 245 to 2,178—still only about 10 percent of the community's residents. Some residents still remember the library as a volunteer "card table" operation in the school basement. Some still drive to libraries that are bigger but farther away. The library board has set a goal of expanding its facility, either at its present site or at another location to be determined. There is a clear need and a tradition of library support among community residents and leaders. A preliminary feasibility study indicates there is excellent potential for a ballot measure supplemented by private fundraising. Building a strong base of community awareness about what the library offers, its needs and the possibilities is key to building momentum.

Goals

- The Somewhere Public Library will enjoy a high profile in the community. It will be seen as an important and popular destination for learning and enjoyment.
- Community leaders and all residents will be aware of and use library services.
- Community leaders and residents will approve a library expansion plan and support a funding campaign.

Objectives

- The library will secure financial support for a new library.
- The number of cardholders will increase 600 percent for a total of 60 percent registration.
- The library will develop partnerships with three [3] or more new community groups.

Positioning

The Somewhere Public Library provides big city service close to home in a comfortable, welcoming atmosphere. In addition to books, it offers audio books, CDs, videos and other multimedia resources. Its "online branch" is open 24/7. Most importantly, there are professional librarians to provide expert assistance. The Somewhere Public Library is a community center for lifelong learning, literacy and enjoyment for families and people of all ages. Although bigger than it looks, the library is not as big as it needs to be. With more space, the library could offer much more. The library is a best value and deserves the community's support.

Key Message(s)

- 1) The Somewhere Public Library provides big city service close to home.
- 2) We're bigger than we look—but not as big as we need to be.

Key audiences

Internal: Staff, Board, Friends, Volunteers External: County officials and community leaders;
Community groups with influential members; Families with children from preschool-high school;
Business and professional community

YEAR 1 — JUNE 2006 - 07

Objectives

- The number of cardholders will increase by 200 percent.
- Attendance at programs will increase by 50 percent.
- Twenty influential individuals and community groups will endorse the building project.
- City officials/other key leaders will approve an expansion plan for the library and endorse a funding plan.
- The library “family” will understand and actively support the library’s new communication focus.
- Local papers will carry at least three [3] feature stories.

Strategies

1. Begin a consistent, planned program of two-way communication.

- Establish a citizens group to advocate support for a bigger library.
- Encourage and prepare staff, board members, Friends and volunteers to deliver the library’s message to library users, their families, friends, neighbors, key officials. Involve them in planning activities. Provide updates.
- Invest in professional graphic design for formatting promotional materials, e.g. the newsletter, bookmarks. Have a consistent look and message. Publish a dynamic brochure with the emphasis on benefits, not just a listing of services. Distribute it outside the library—at meetings of community groups and other community locations.
- Conduct a customer satisfaction survey. Use quotes in promotional materials.
- Provide evaluation forms at all programs asking how the audience members heard about the program, its quality and suggestions for other programs.
- Invite customer comments in the library and on the library’s home page. Respond to all comments in writing and with action, when appropriate.

2. Seek a higher profile in the media.

- Make a media plan with dates for seeking news stories in connection with special events, feature stories and editorial endorsements.
- Place at least three [3] feature stories about services such as “databases” or homework help for kids and—what they are and what they can do for you.
- Invite local newspapers to send a photographer for special kids events or take and submit photos.

- Offer reporters a demonstration of how the library's databases work.
- Seek a story comparing the library's facilities with communities of similar size.

3. Reach out to elected officials, community leaders and groups with influential members.

- Communicate at least once a month with key officials in person and print. Provide regular updates. Offer to demonstrate the library's databases at their desk.
- Present a state-of-the-library report to the county board and key organizations.
- Recruit three [3] partners, including at least one [1] new partner, to cosponsor/underwrite activities for National Library Week, Library Card Sign-up Month, etc.
- Present six programs/host tours for county officials, members of the Chamber of Commerce and other influential groups.

4. Reach out to families.

- Sponsor a library card sign-up drive during national Library Card Sign-up Month in September. Offer rewards for library users who recruit new card registrants.
- Visit all day care centers, kindergarten and first grade classrooms. Provide library card registration, booklists and other promo materials for teachers and for kids to take home to parents.
- Display photos of families holding their library cards in the library and post them on the website.
- Sponsor a contest "Why My Family Uses the Library" and award prizes underwritten by partners.

Evaluation

- A stronger, more consistent look and message in library publications.
- Feedback from users and target audiences, customer satisfaction surveys, word of mouth.
- See objectives.